



# TAMS TV Market Overview

February 2022



# Content

- **TV viewing trends and TV screen usage**  
(source: TAMS-Arianna)
- **OTT and equipment tracker**  
(source: TAMS panel questionnaire)
- **Video consumption on all devices across the online universe**  
(source: DCS and Fusion)

# TV viewing trends and TV screen usage

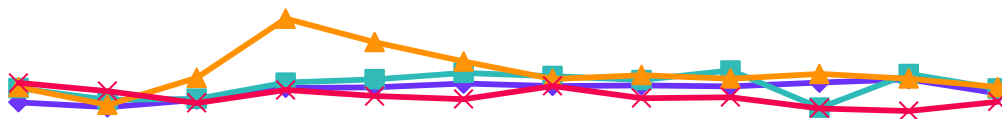
(source: TAMs)

# Trend: Time spent viewing

# Time spent viewing: 4-year trend

## Average hours spent per day by month

Total TV Screen Usage (including non-broadcast activity)  
*All Day*



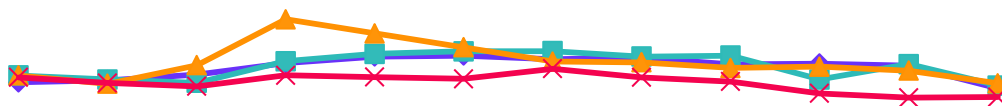
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2018	2:59	2:53	3:02	3:15	3:15	3:19	3:17	3:17	3:16	3:20	3:24	3:09
2019	3:14	3:01	3:03	3:20	3:24	3:31	3:27	3:23	3:33	2:53	3:30	3:14
2020	3:15	2:56	3:25	4:30	4:04	3:43	3:24	3:28	3:24	3:30	3:25	3:15
2021	3:20	3:11	2:58	3:12	3:05	3:02	3:17	3:03	3:04	2:52	2:49	3:00

2018 2019 2020 2021



# Time spent viewing: 4-year trend

## Total TV Screen Usage (including non-broadcast activity) *Prime Time*



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2018	1:13	1:14	1:17	1:23	1:26	1:26	1:24	1:25	1:22	1:22	1:21	1:10
2019	1:16	1:14	1:13	1:24	1:27	1:29	1:29	1:26	1:26	1:14	1:22	1:11
2020	1:16	1:12	1:21	1:45	1:38	1:31	1:23	1:23	1:20	1:21	1:19	1:12
2021	1:15	1:13	1:11	1:16	1:16	1:15	1:20	1:15	1:13	1:07	1:05	1:05

◆ 2018   
 ■ 2019   
 ▲ 2020   
 ✕ 2021



# Time spent viewing: 4-year trend

Broadcast TV only (excluding non-broadcast activity)  
*All Day*



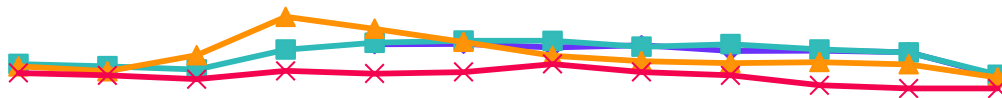
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2018					2:47	2:50	2:47	2:48	2:47	2:51	2:55	2:38
2019	2:43	2:34	2:34	2:49	2:53	2:58	2:54	2:48	3:00	2:53	2:56	2:39
2020	2:39	2:27	2:51	3:40	3:18	3:00	2:43	2:40	2:41	2:46	2:44	2:33
2021	2:37	2:31	2:22	2:31	2:25	2:27	2:37	2:25	2:27	2:18	2:16	2:23

2018 2019 2020 2021



# Time spent viewing: 4-year trend

Broadcast TV only (excluding non-broadcast activity)  
*Prime Time*



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
◆ 2018					1:17	1:17	1:15	1:16	1:14	1:14	1:13	1:01
■ 2019	1:07	1:06	1:04	1:14	1:18	1:19	1:19	1:16	1:17	1:14	1:13	1:02
▲ 2020	1:06	1:03	1:11	1:31	1:25	1:18	1:11	1:08	1:08	1:08	1:07	1:00
✕ 2021	1:02	1:01	0:59	1:04	1:02	1:03	1:07	1:03	1:01	0:56	0:55	0:55

◆ 2018   ■ 2019   ▲ 2020   ✕ 2021





# Time spent viewing: 4-year trend

## Non-broadcast TV only (excluding broadcast TV) *All Day*



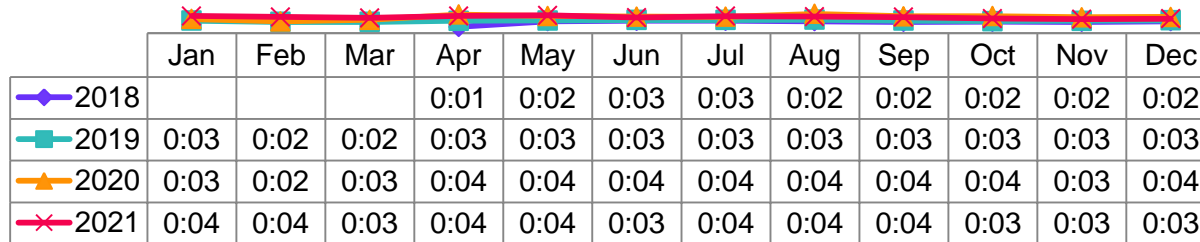
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2018					0:09	0:09	0:09	0:09	0:09	0:09	0:09	0:10
2019	0:10	0:09	0:09	0:10	0:10	0:10	0:11	0:11	0:11	0:10	0:11	0:11
2020	0:11	0:09	0:11	0:16	0:15	0:14	0:13	0:16	0:14	0:14	0:13	0:14
2021	0:14	0:13	0:12	0:13	0:13	0:11	0:13	0:12	0:12	0:11	0:11	0:12

◆ 2018  
 ■ 2019  
 ▲ 2020  
 ✕ 2021



# Time spent viewing: 4-year trend

## Non-broadcast TV only (excluding broadcast TV) *Prime Time*



◆ 2018  
 ■ 2019  
 ▲ 2020  
 ✖ 2021



# Trend: Viewing ratings

## Total TV Screen Ratings (including non-broadcast activity)

Avg All Day	AMR%	AMR	Universe	Sample
2018	13.4	6 087 016	45 062 118	10 729
2019	14.0	6 476 383	46 280 042	10 974
2020	14.7	6 992 478	46 635 618	10 444
2021	12.8	6 420 751	49 995 282	10 465

Jan 2018 12.5

Jan 2019 13.5

Jan 2020 13.6

Jan 2021 13.9

### Broadcast TV only ratings

Avg AD	AMR%	AMR
2018	11.7	5 341 100
2019	11.7	5 446 379
2020	11.9	5 624 209
2021	10.2	5 100 959

### Non-broadcast activity only ratings

Avg AD	AMR%	AMR
2018	0.7	308 524
2019	0.7	343 544
2020	1.0	455 514
2021	0.8	439 931



## Total TV Screen Ratings (including non-broadcast activity)

Avg PT	AMR%	AMR	Universe	Sample
2018	27.0	12 262 846	45 062 118	10 729
2019	27.4	12 725 035	46 280 042	10 974
2020	28.0	13 265 159	46 635 618	10 444
2021	24.4	12 198 042	49 995 282	10 465

Jan 2018	24.4
Jan 2019	25.7
Jan 2020	25.6
Jan 2021	25.3

### Broadcast TV only ratings

Avg PT	AMR%	AMR
2018	24.6	11 240 221
2019	24.3	11 278 874
2020	23.9	11 353 438
2021	20.4	10 198 905

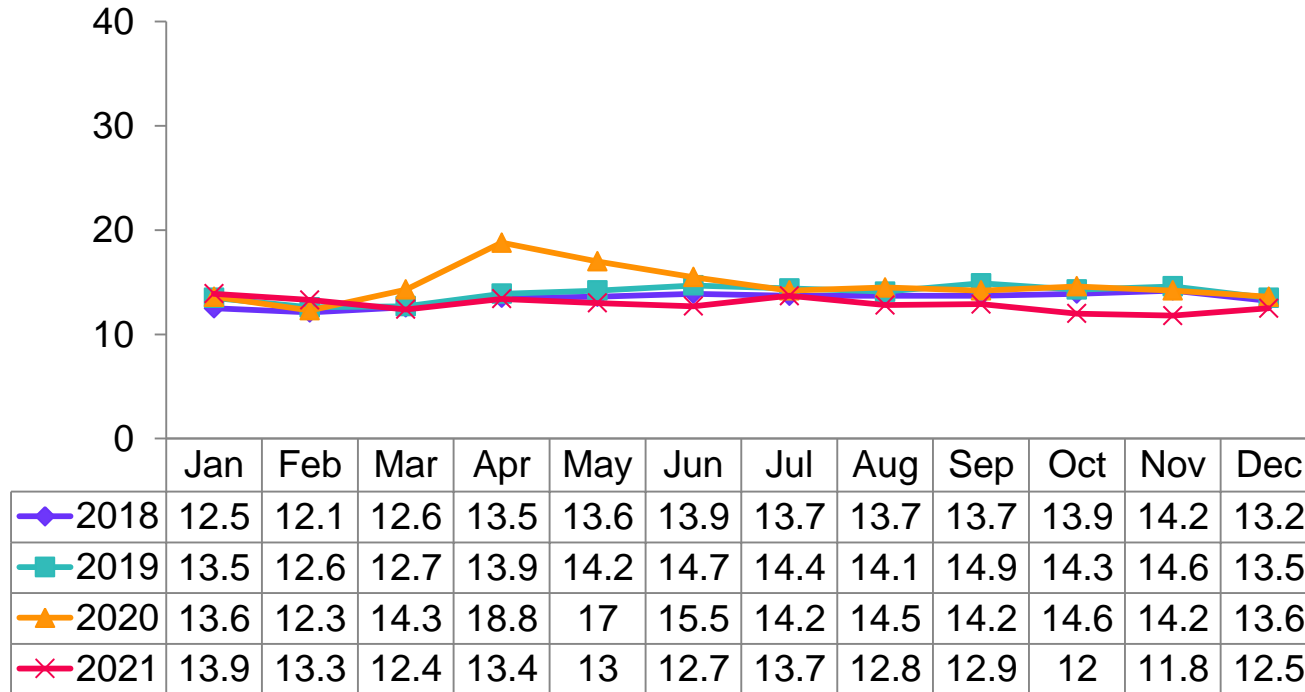
### Non-broadcast activity only ratings

Avg PT	AMR%	AMR
2018	1.0	446 789
2019	1.0	482 271
2020	1.3	636 486
2021	1.3	666 379



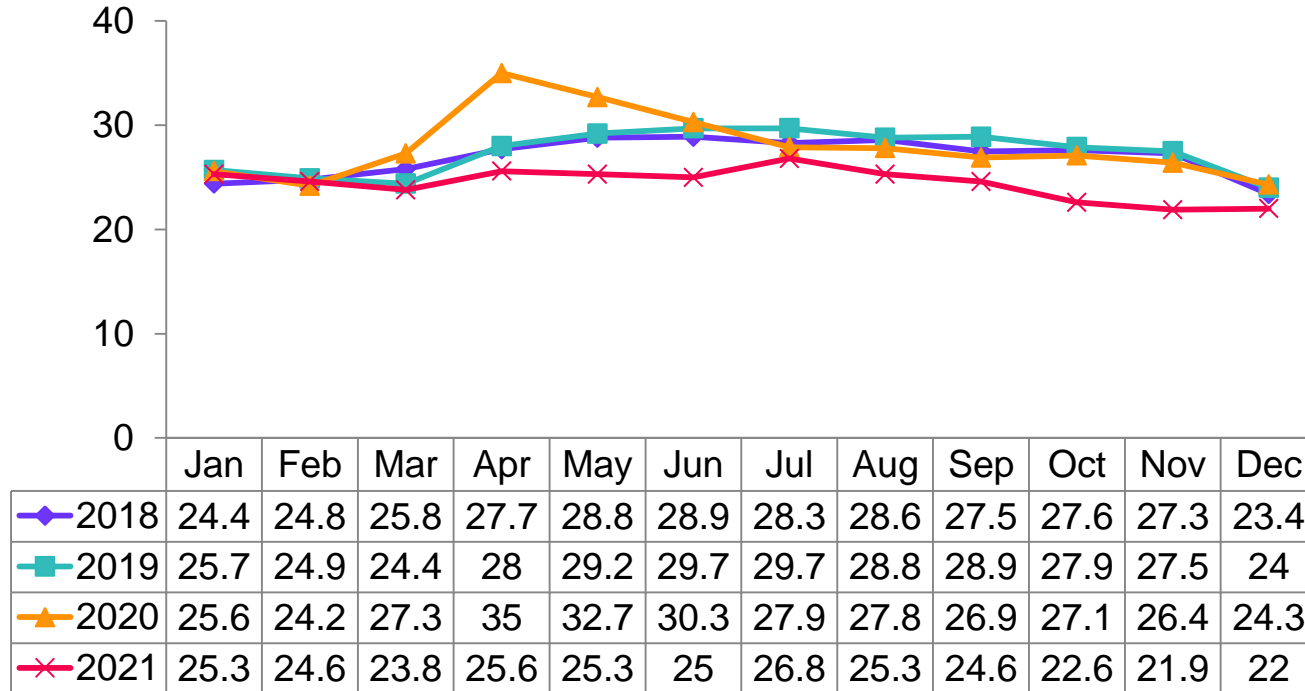
# Total TV Screen Ratings (including non-broadcast activity)

## AMR%: All Day



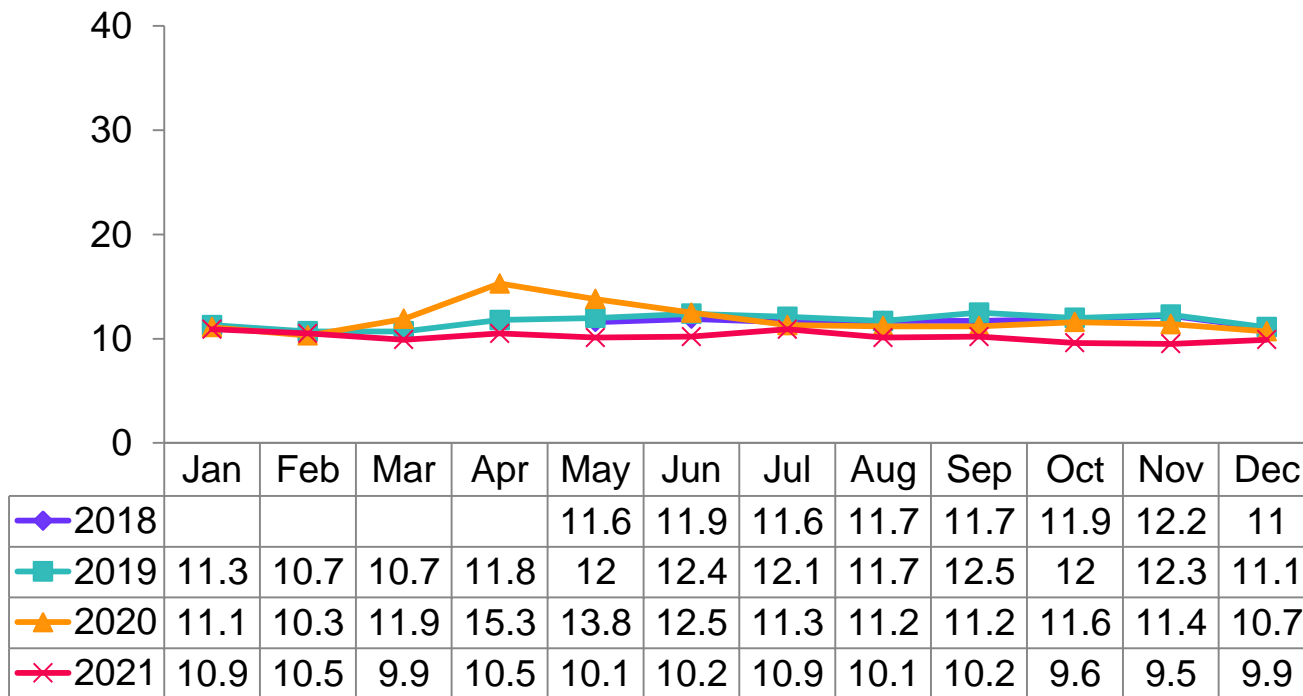
# Total TV Screen Ratings (including non-broadcast activity)

## AMR%: Prime Time



# Broadcast TV only Ratings (excl. non-broadcast activity)

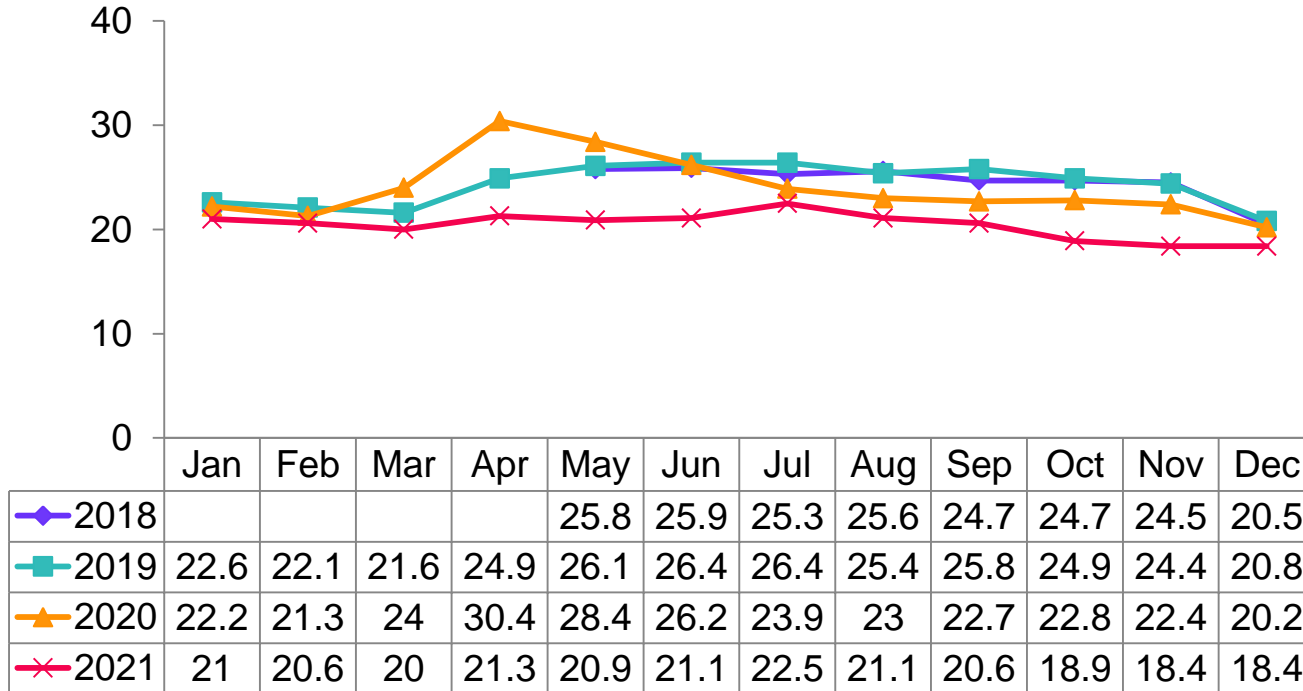
## AMR%: All Day





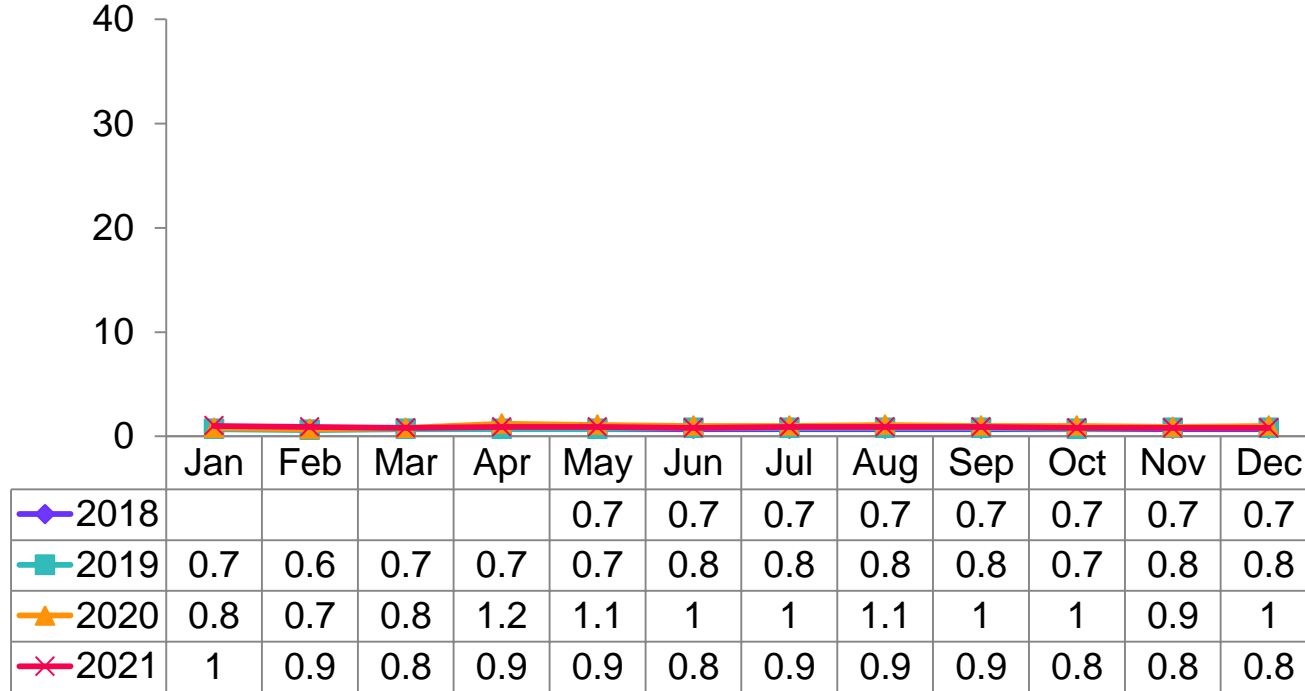
# Broadcast TV only Ratings (excl. non-broadcast activity)

## AMR%: Prime Time



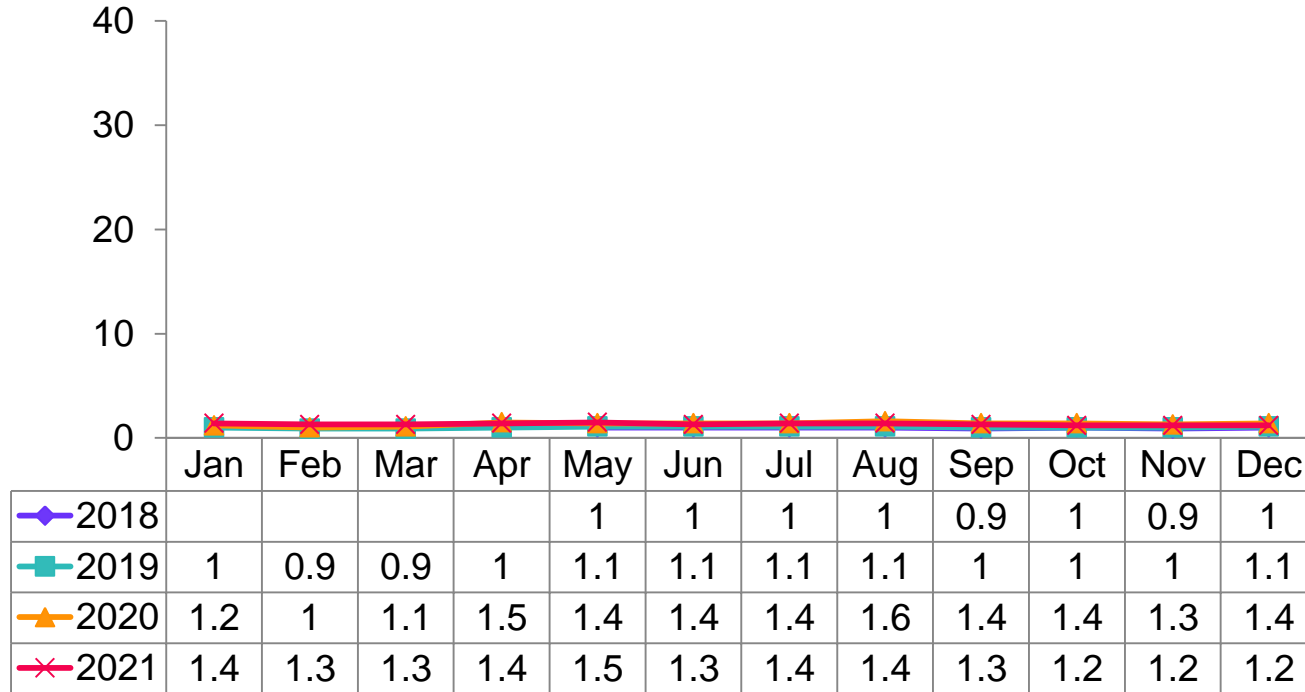
# Non-broadcast activity ratings

## AMR%: All Day



# Non-broadcast activity ratings

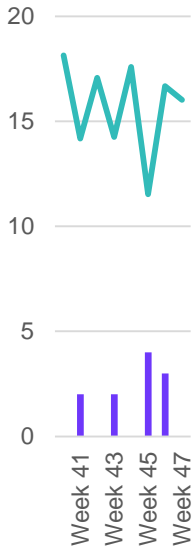
## AMR%: Prime Time



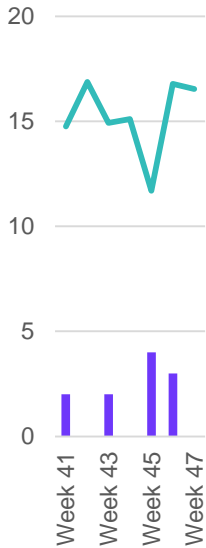
# Load shedding impact on AMR%

## Load shedding weeks 40-47 2021

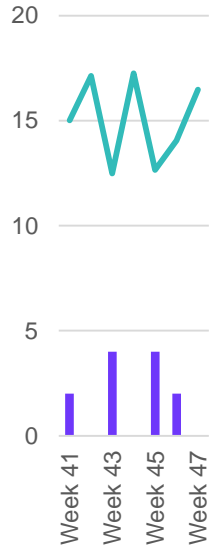
### Monday



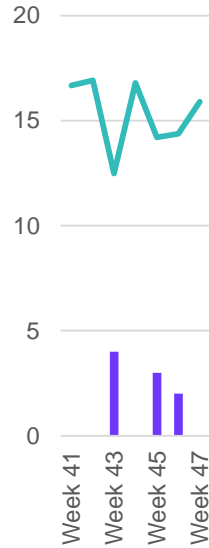
### Tuesday



### Wednesday



### Thursday



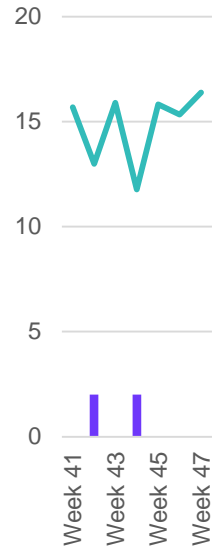
### Friday



### Saturday



### Sunday



# Channel ratings (ranked on 2021)

All Day Avg AMR%	2018	2019	2020	2021
DStv commercial total*	2.53	2.46	2.67	3.11
SABC 1	3.09	2.84	2.62	1.98
e.tv	1.75	1.97	1.82	1.81
OpenView total	0.66	0.82	1.03	1.65
SABC 2	1.42	1.15	0.98	0.66
Viacom Group	0.41	0.48	0.61	0.42
SABC 3	0.62	0.51	0.36	0.26

\*excluding Viacom channels



# Channel ratings (ranked on 2021)

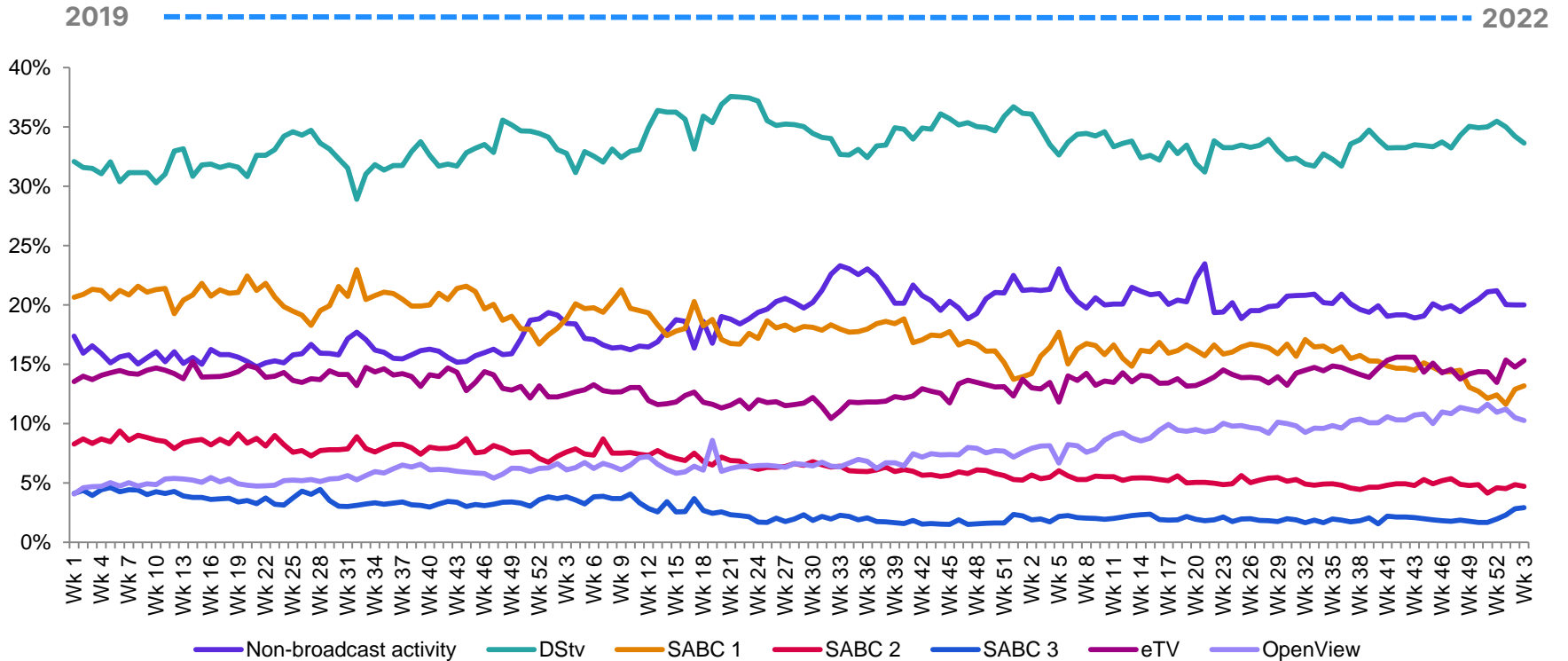
Prime Time Avg AMR%	2018	2019	2020	2021
SABC 1	8.37	7.93	7.28	5.41
DStv commercial total*	4.76	4.58	4.82	5.21
e.tv	3.80	4.35	4.19	4.14
OpenView total	1.15	1.39	1.66	2.81
SABC 2	3.27	2.57	2.19	1.51
Viacom Group	0.54	0.60	0.69	0.49
SABC 3	0.99	0.70	0.55	0.42

\*excluding Viacom channels



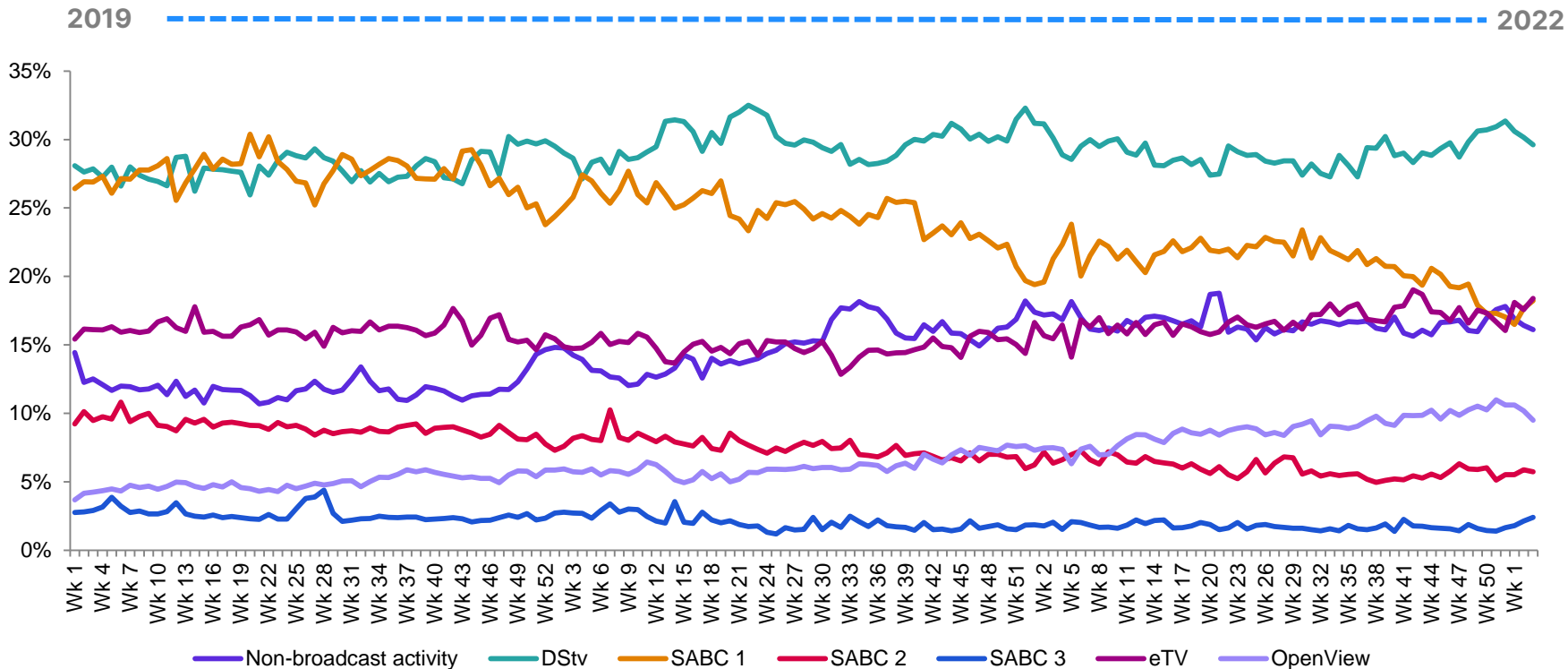
# 4-year trend total screen share (2019-2022)

## All Day



# 4-year trend total screen share (2019-2022)

## Prime Time



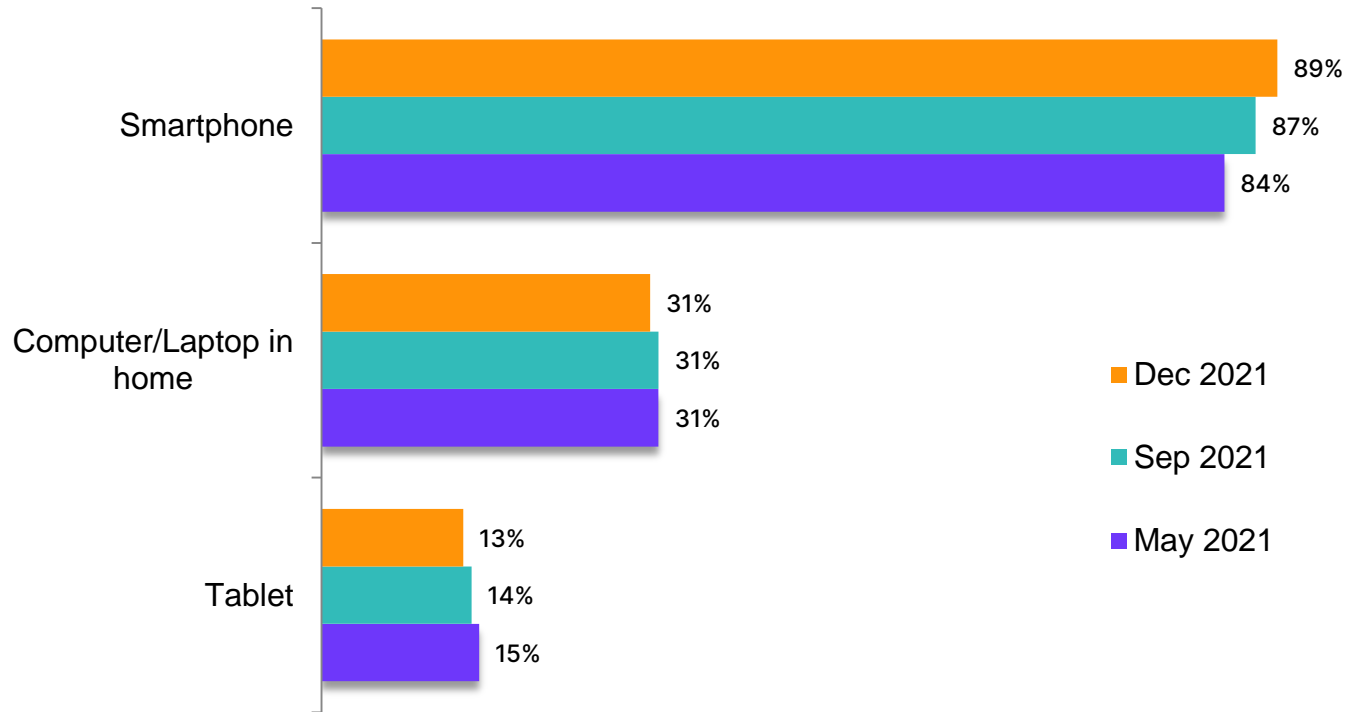


# OTT and equipment tracker

(source: TAMS panel questionnaire)

# Incidence of OTT on TAMS panel

## Devices in household

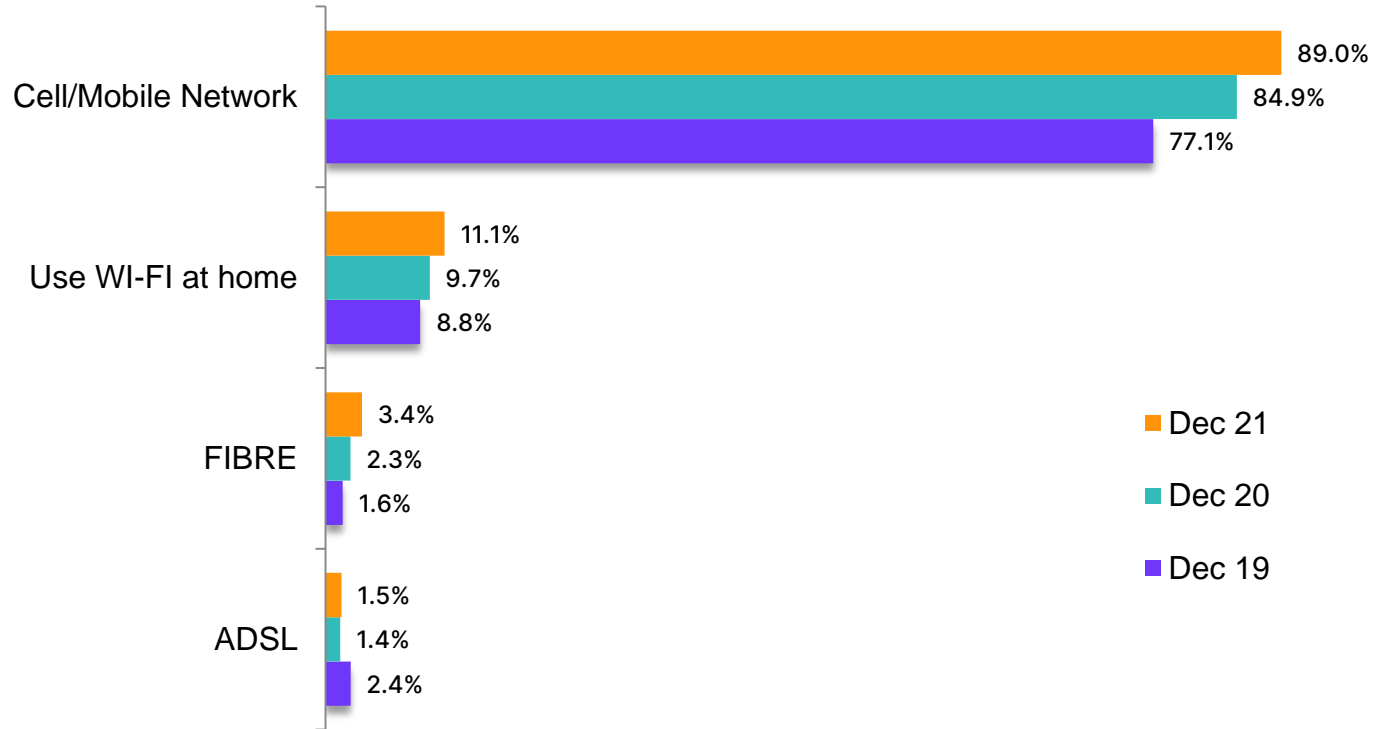


Source: OTT Tracker



# Incidence of OTT on TAMS panel

## Internet connection used at home

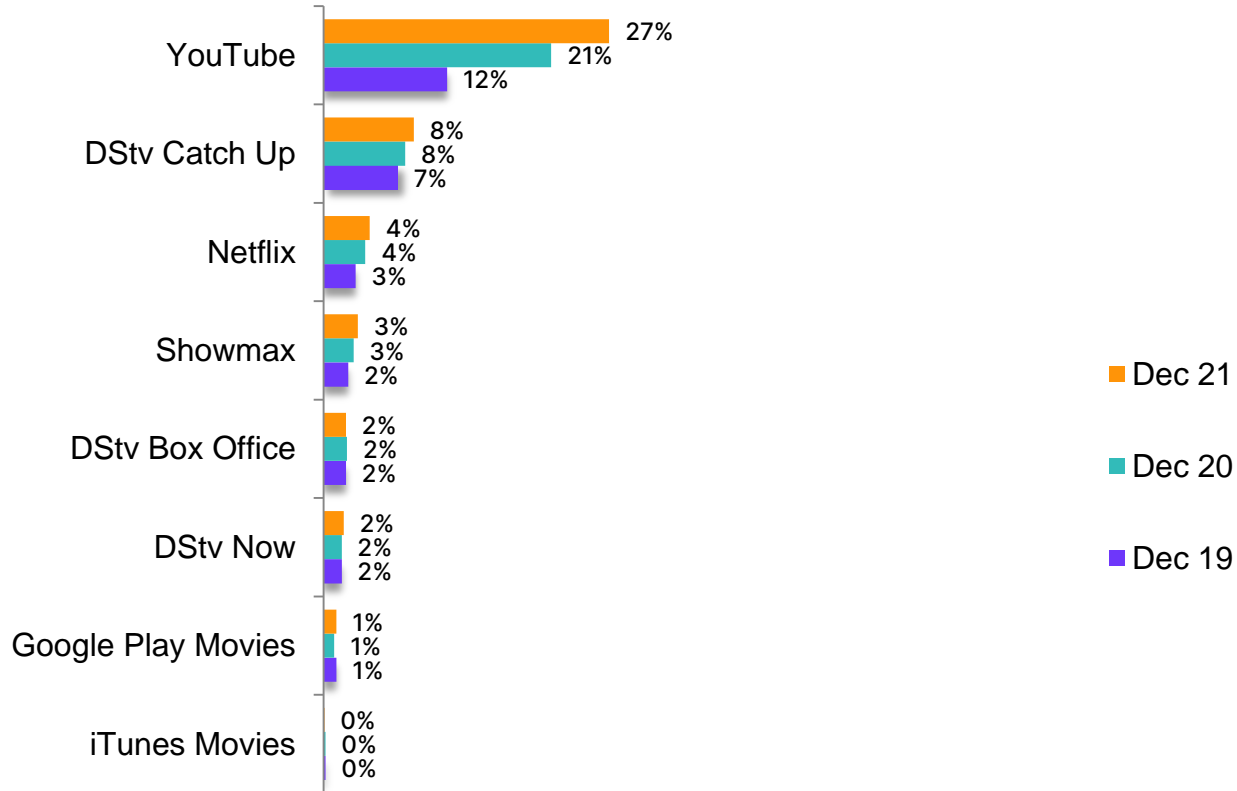


Source: OTT Tracker



# Incidence of OTT on TAMS panel

## HHs viewing OTT and VOD

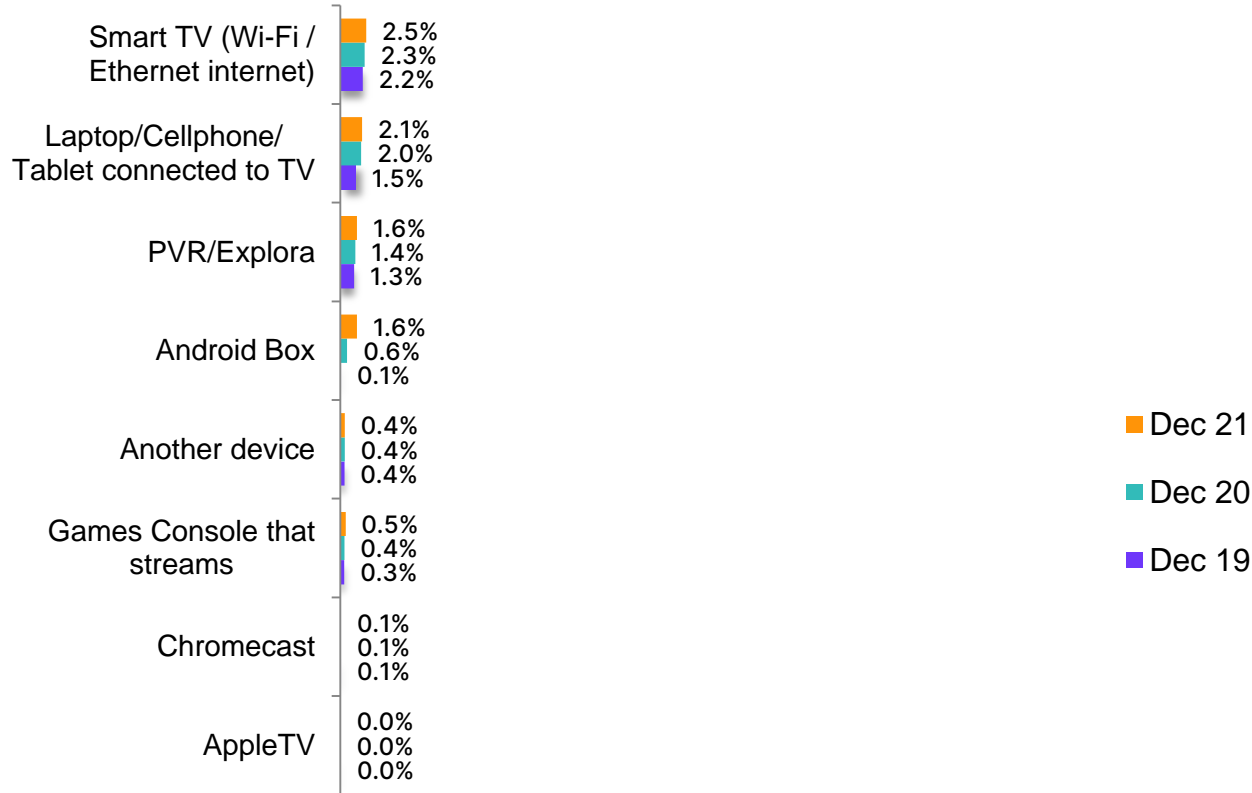


Source: OTT Tracker



# Incidence of OTT on TAMS panel

## Online Connection to TV-set



Source: OTT Tracker

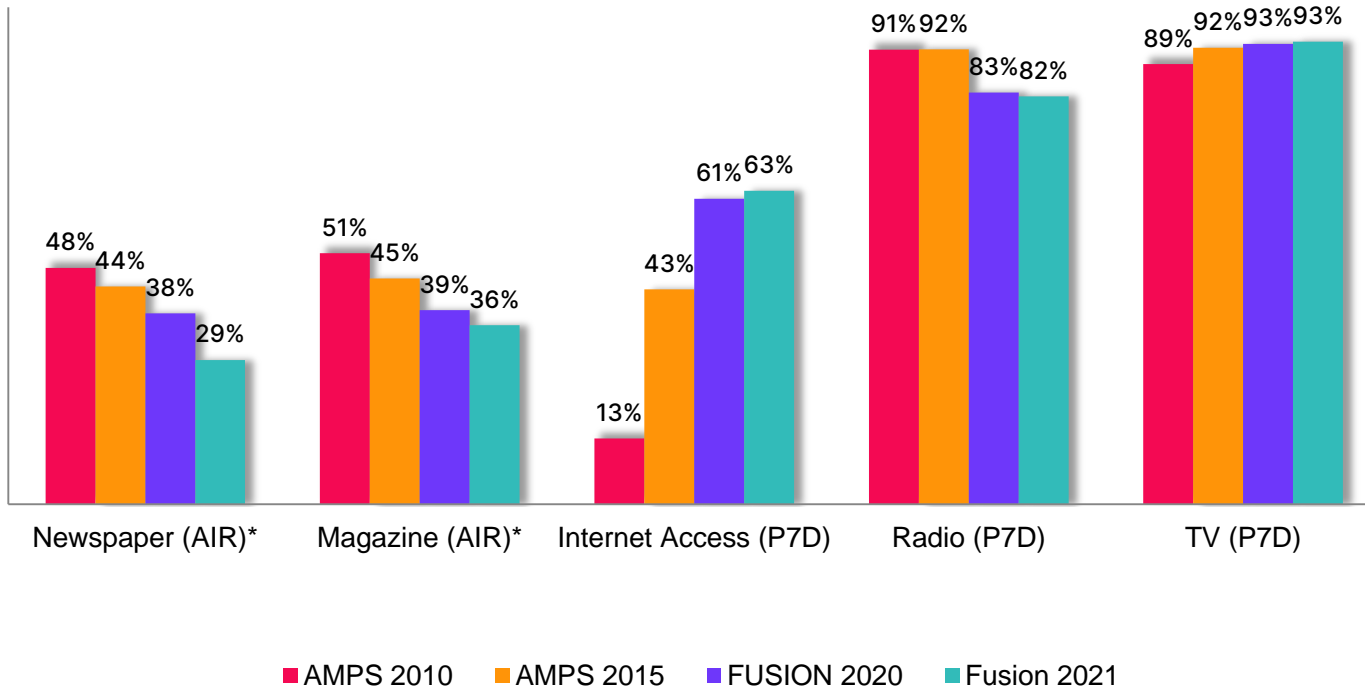


# Video consumption on all devices across the online universe

(source: DCS and Fusion)

# Media Consumption

Base: total 15+ population

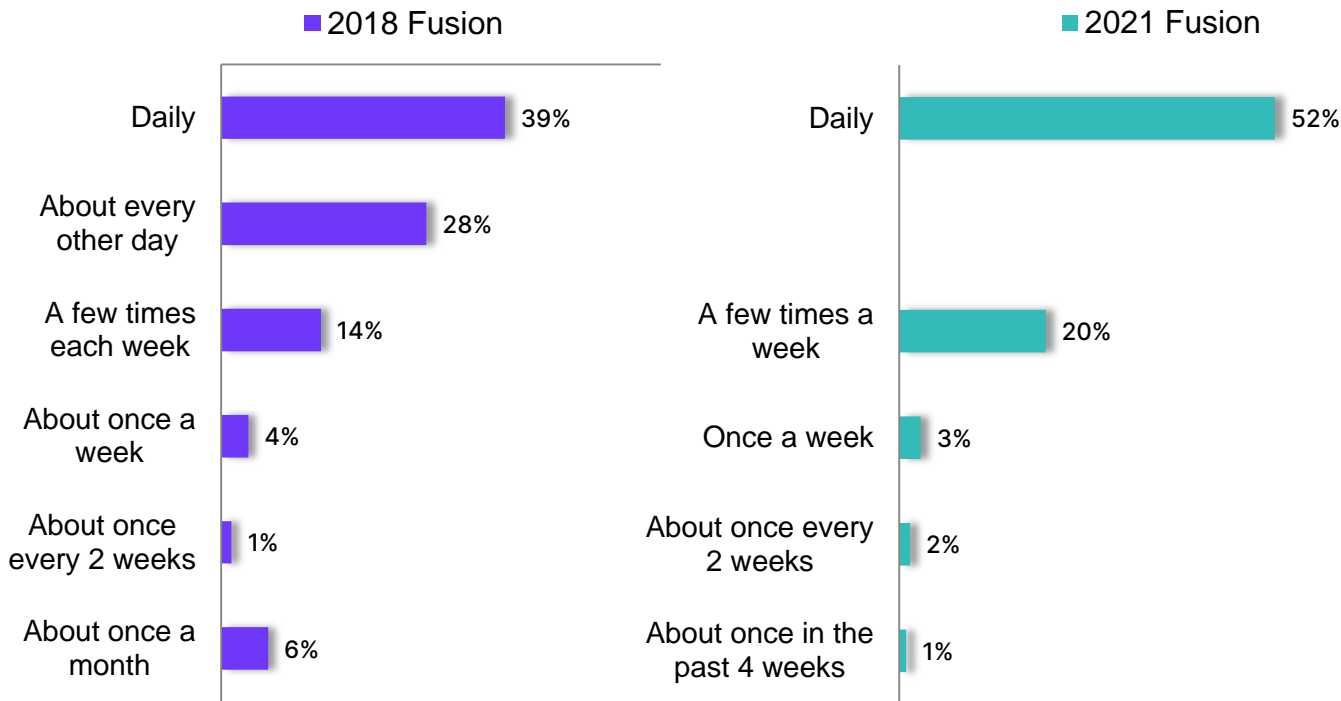


\* Includes paper and online in 2020 and 2021



# Watch TV and access the internet at the same time

Base: online past 4-week universe



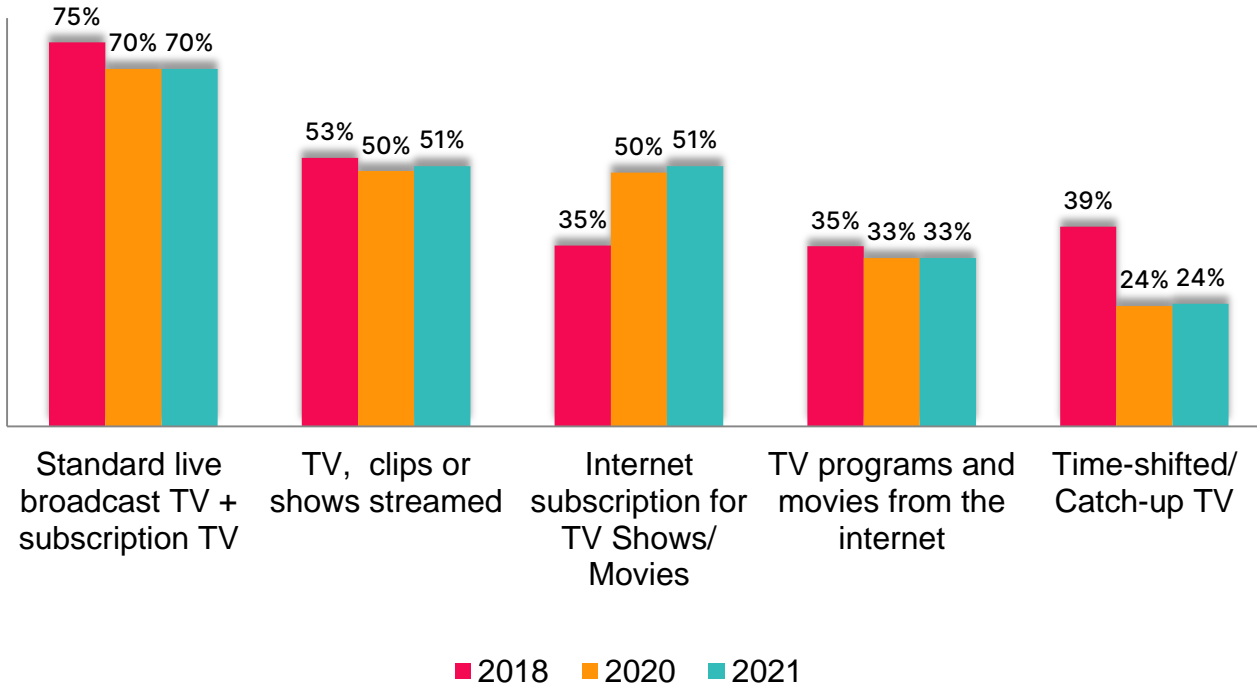
Online past 4 weeks universe  
2018 20.7m  
2021 27.5m





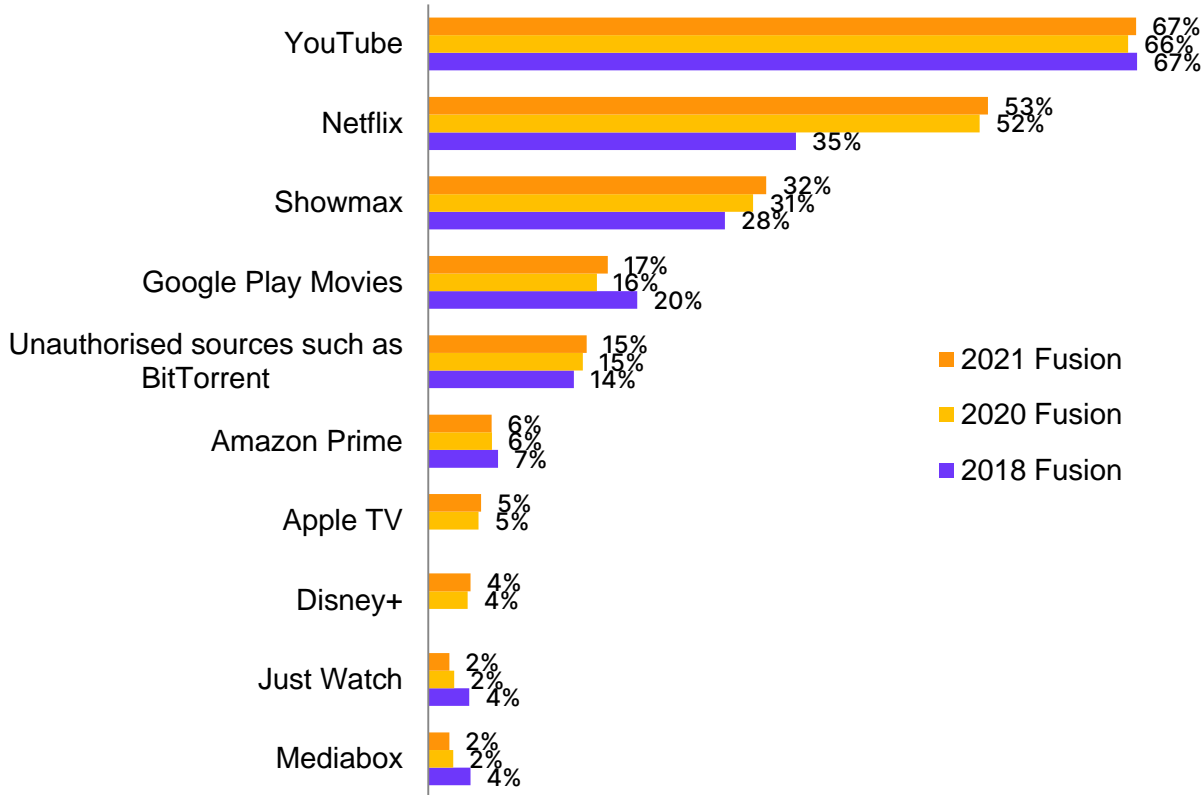
# Ways of watching TV/movies

Base: online past 4 weeks universe



# Internet TV/VOD – personally viewed

Base: online past 4 weeks universe

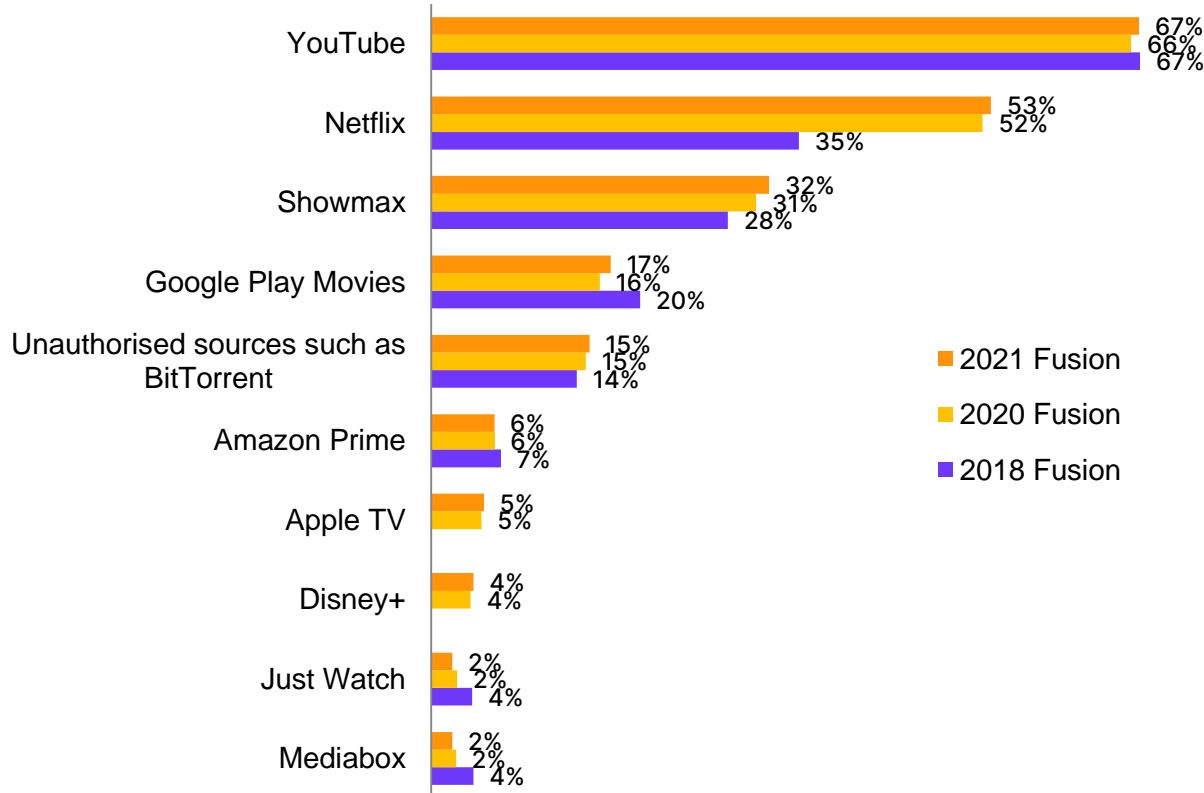


Any VOD viewing  
75.1%



# Internet TV/VOD – personally viewed

Base: online past 4 weeks universe

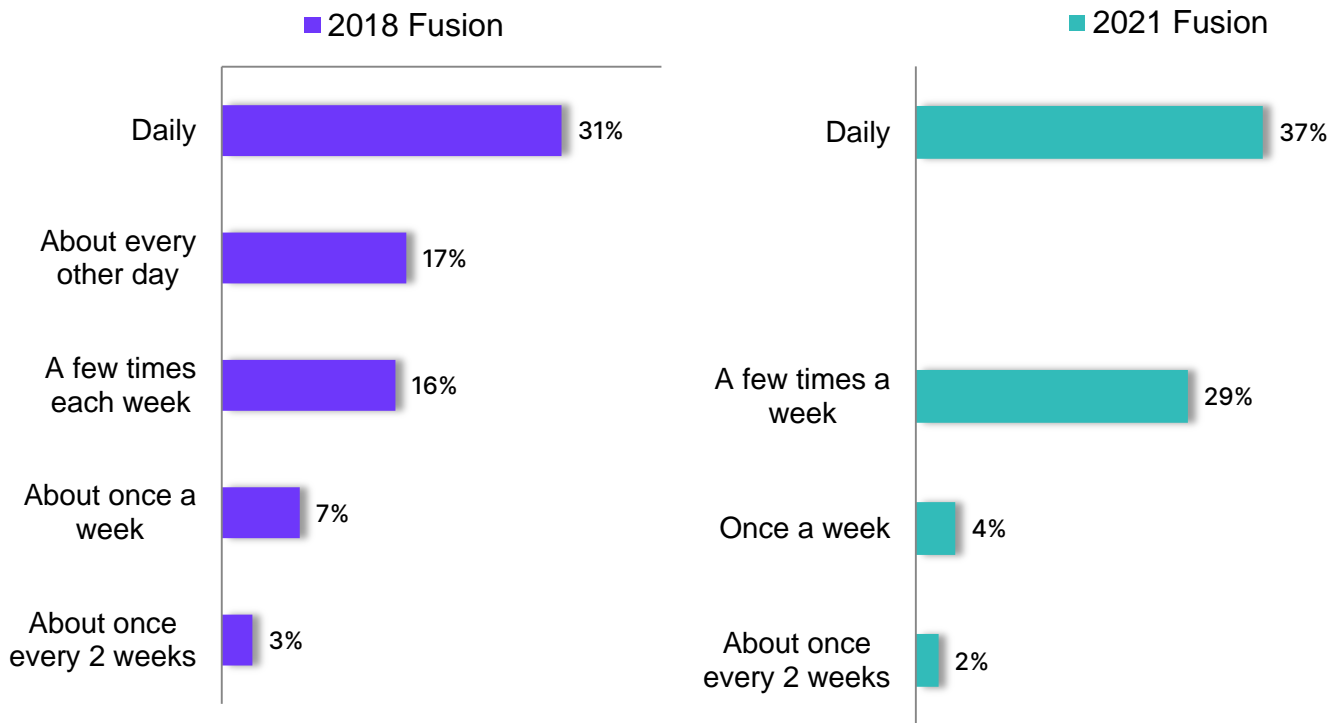


Any VOD viewing  
**75.1%**



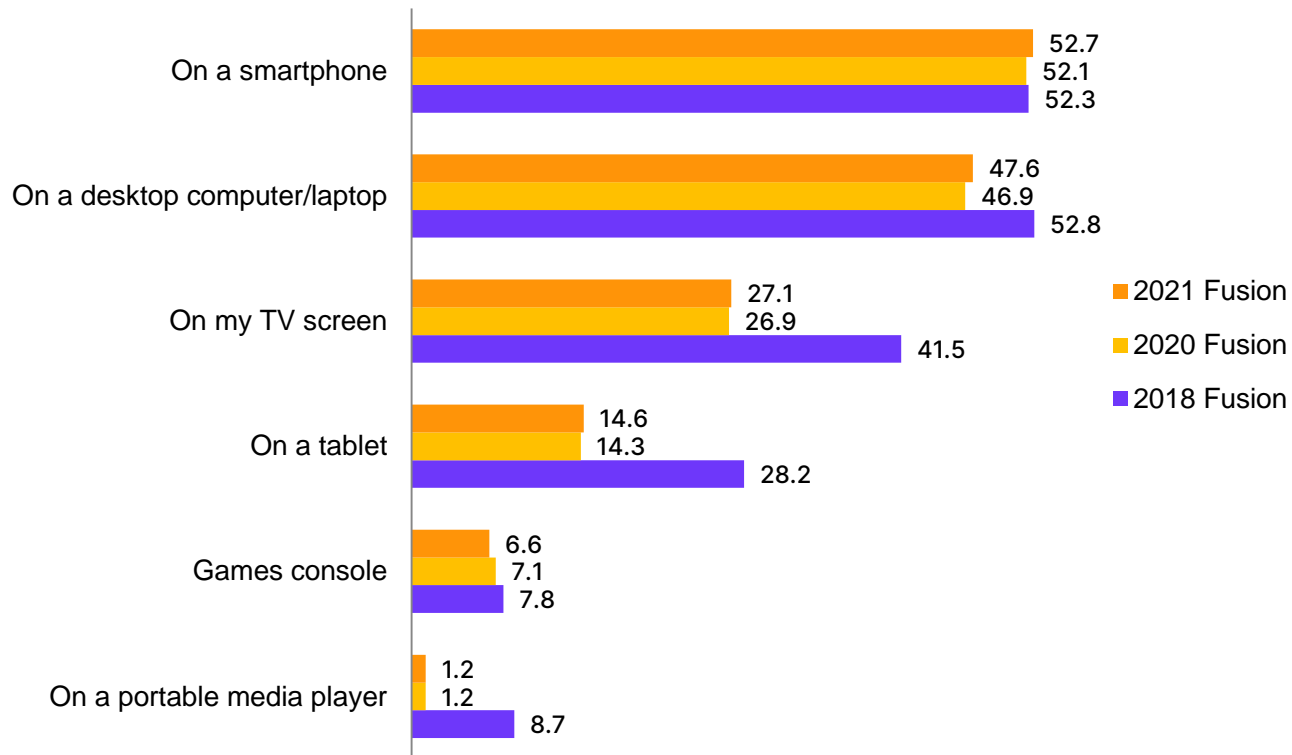
# Internet TV/VOD viewers – frequency of viewing

Base: online past 4 weeks universe



# Internet TV/VOD viewing – fewer devices are being used

Base: online past 4 weeks universe



Average number of devices used

2018 2.5

2020 2.0

2021 2.0



